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Since the brain is indisputably a multi-path, multimodal apparatus, the notion of mandatory sequences or even of any fixed sequences is unsupported. Each of us learns in a personal, highly individual, mainly random way . . . That being the case any group instruction that has been tightly, logically planned will have been wrongly planned for most of the group, and will inevitably inhibit, prevent or distort learning. **L. A. Hart**

LEARNING OUTCOMES

- Achieve collaborative design of training, including agreement on measures to determine the success of training events (including short- and long-term programmes).
- Explain the implications for training design of organisational factors and learner characteristics.
- List criteria to guide the use of learning and training methods in different kinds of training event.
- Choose and assess training materials.
- Design support processes and systems for learners.

CHAPTER OUTLINE

- The principles of learning in which training design, delivery, transfer and evaluation should be embedded.
- How to identify and work with partners in the design process; how to handle conflict with the aim of achieving continuous collaboration.
- Formal and informal learning processes and methods that can be incorporated into training activity, including
 - their fit with the learners' characteristics and with workplace culture
 - the value they can produce, given their financial and non-financial cost
 - how to integrate chosen methods into training design.
- How to choose, design, pilot and assess training materials; how to incorporate them into training events.
- How to incorporate learner support systems and processes into the design of training events.

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INTRODUCTION

We have arrived at one of the most important chapters in the book! And yet, designing training and learning often takes place in a darkened room, with a cold towel round your head! So, the purpose of this chapter is to remove some of the hidden mysteries that have surrounded the subject in many people's minds. By breaking the subject down into manageable sections, and by using an effective framework, you will be able to turn your new-found knowledge and skills to good effect. I would go further; by employing the techniques outlined in this chapter efficiently and effectively, you should be able to design any learning event for any learners in any organisation at any stage in your career!

THE DESIGN OF TRAINING EVENTS – IN THEORY

The principles of learning

In their significant review of the theory and practice of training, which I wholeheartedly recommend, Cheetham and Chivers (2001) outline – among many other themes – some of the major theories of how professionals learn:

- *Behaviourism*. Simple behaviourist theory is now widely regarded as overly reductionist, but aspects of it undoubtedly work, and most people would agree their behaviour is affected by the various forms of reward (or punishment) that result from their actions . . . Echoes of behaviourism can still be found in the importance educators attach to feedback and reinforcement, and within various instructional techniques used in professional development.
- *Behaviourism applied*. Behaviourism has also successfully influenced the design of programmed learning, teaching machines, computer-based training and interactive video . . . In all of these areas training is offered in small steps, responses are required from trainees at various points, and feedback is given.
- *Cognitive approaches*. In contrast to behaviourism, with its concentration on inputs and outputs, cognitive approaches are more concerned with what goes on between two stages, in other words, the mental processes that accompany such activities as learning, reasoning or problem-solving. These kinds of cerebral activity are likely to involve processes such as memorising, concept formation, and the use of symbols and language. Cognitive approaches look at the way people absorb information from their environment, sort it mentally and apply it in everyday activities.
- *Gestalt theories*. This school views consciousness as involving organised structures, patterns and configurations, and learning as a holistic process that cannot meaningfully be broken down into constituent parts, even for the purpose of analysis. The German word *Gestalt* simply means shape or pattern, but can also refer to 'an integrated whole' . . . Gestalt theorists advocate that learning techniques should themselves be holistic, rather than fragmented, and should recognise the importance of developing appropriate mental patterns and structures.
- *Mixed approaches*. 'Social learning' . . . sees learning as a continuous, dynamic and reciprocal interaction between individuals affecting, in particular, their attributes, values and behaviours. It also recognises the importance of the learning environment.
- *Constructivism and discovery learning*. This holds that the construction of knowledge is very much an individual process and that different learners find their own way of making sense of the world . . . They form and test their own hypotheses, based on what they see and hear around them. The view has been used to support 'discovery learning' methods, but this approach has been criticised for expecting too much of the learner and risking critical gaps in what is learned.

While such approaches are fascinating, they have caused problems for many years for professional HRD practitioners. So, many trainers were extremely grateful to Knowles (1998) when he first published his views on adult learning, for they had found difficulty for a long time with, on the one hand, the animal-based

research theories of Skinner, Thorndike and Pavlov, and on the other hand with the ancient pedagogical approaches still holding sway throughout much of the British higher education system. Knowles' theory of *andragogy*, or adult learning, built on earlier efforts by Lewin, and offers an alternative view of learning at work that more closely matched the reality most trainers encounter on a daily basis. Knowles' principles of andragogy may be simplified as follows:

- Mature adults are self-directed and autonomous in their approach to learning.
- They learn best through experiential methods.
- They are aware of their own specific learning needs generated by life or work.
- They have a need to apply newly acquired knowledge or skills to their immediate circumstances.
- Learning should be seen as a partnership between trainers and learners, and learners' own experiences should be used as a resource

Despite generalised acceptance of his theory, there have been some criticisms. Jarvis (1984) feels that andragogy has acquired the status of an

Established doctrine . . . without being grounded in sufficient research to justify its dominant position.

Moreover, Brookfield (1986) points out that although learner autonomy and self-directedness are at the core of andragogy, these may not be generalised traits. From his observation, he argues that:

Many adults pursue lifestyles in which self-directed behaviours are noticeably absent.

Furthermore, Cheetham and Chivers (2001) declare that:

Various pieces of research suggest, for example, that these traits may be affected by both class differences . . . and cultural differences. Knowles' assertion that adult learners are aware of their own learning needs is also open to challenge, at least as a general proposition. Some adults may be aware of some of the gaps in their knowledge and competence, but it is doubtful whether anyone is fully aware of his/her own shortcomings. It might be argued that professionals in particular ought at least to have a general awareness of their own learning needs, and indeed ought to be self-directed learners. But saying that they *ought* does not guarantee that they *will*. It seems likely that such traits would be variable, even amongst professionals.

Recognising the limits of one's own competence (and therefore learning needs) would certainly seem to be an essential trait for a professional. Self-development skills would also seem to be important. But both may have to be learned, rather than occurring naturally . . . Despite some shortcomings, andragogy does offer a set of principles, which many trainers seem to have found useful. Andragogy has also made an important contribution to the design of professional development programmes in the past and no doubt will continue to do so.

Instead, Cheetham and Chivers (2001) offer a novel perspective on adult learning, which they call *symbolic interactionism*:

- Adults are more concerned with whether they are changing in the direction of an idealised self-concept than whether they are meeting objectives set by others.
- Adults with higher self-esteem learn better than those with lower self-esteem.

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- The self is affected by each new role undertaken by the learner.
- Adults learn best when they perceive themselves as learners.

To begin to understand any theory of adult learning, we must first explore Kolb's famous theory (1981) of experiential learning:

- Learning is best conceived as a process, rather than in terms of outcomes.
- Learning is a continuous process grounded in experience.
- The process of learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world.
- Learning is a holistic process of adaptation to the world.
- Learning involves transactions between the person and the environment.
- Learning is the process of creating knowledge.

From this original work on experiential learning, he developed four learning modes: concrete experience; reflective observation; abstract conceptualisation; and active experimentation, which are expressed in Figure 15.

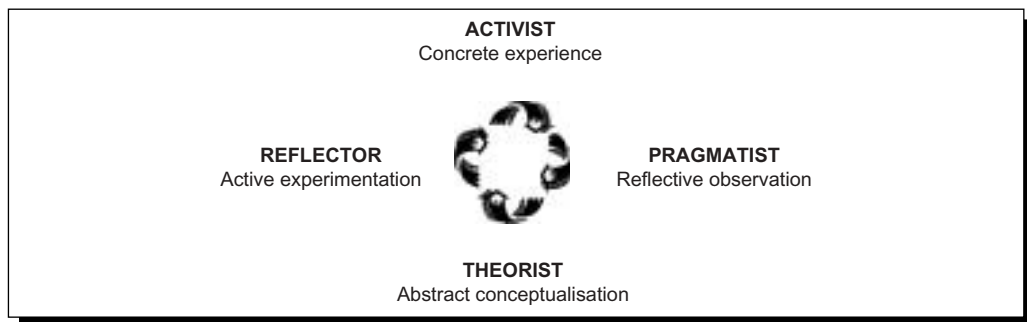


Figure 15 Kolb's experiential learning cycle

These in turn led to four learning approaches (as in Figure 16):

- converger – a person who combines abstract conceptualisation with active experimentation
- diverger – one who combines concrete experience and reflective observation
- assimilator – one who combines abstract conceptualisation and reflective observation
- accommodator – one who combines concrete experience and active experimentation.

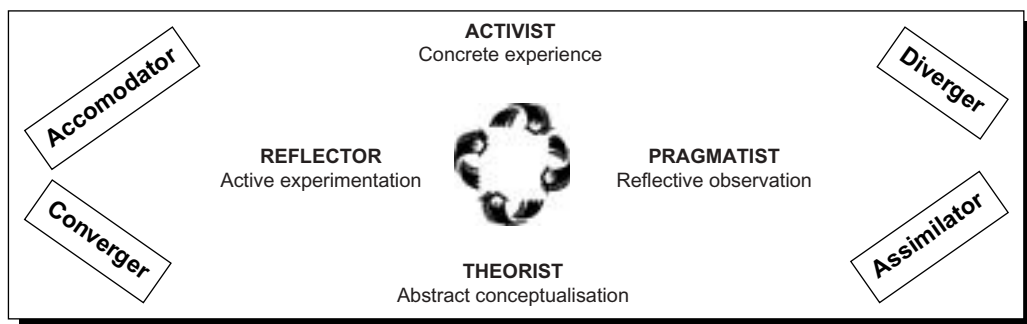


Figure 16 Four approaches to learning

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These approaches later became adapted by Honey and Mumford (1986) to become their four preferences of learning style, which are shown in Figure 17.

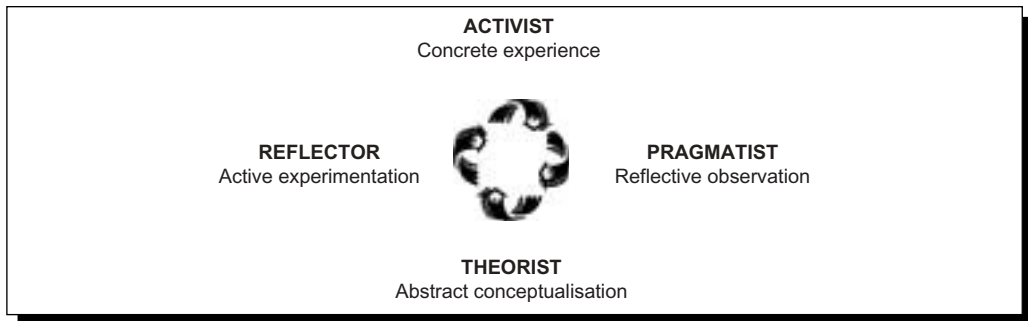


Figure 17 Honey and Mumford's learning preferences

- activist – a person who learns through constant and enthusiastic activity
- reflector – a person who stands back, observes and thinks a lot before getting actively involved
- theorist – a person who likes to rationalise and synthesise information into logical patterns
- pragmatist – a person who likes to try out ideas and turn theories into practice.

And we can also see associations with the four main ways of learning: imitation; thinking; being told; and trial and error, as illustrated in Figure 18.

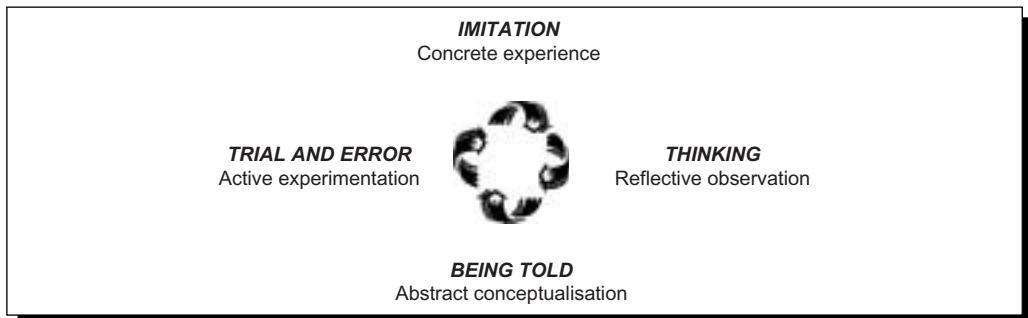


Figure 18 Four ways of learning

Having made these important links, we are now in a position to note some echoes of the concerns some commentators have expressed about andragogy. Self-directedness is not necessarily a requirement of experiential learning. Similarly, experiential learning does not necessarily require learners to be consciously aware of their own specific learning needs. Indeed, it is often not until some time after the initial learning experience that learners are able to recognise the things they have learnt. Others have challenged this approach, saying that learning through experience takes the form of a neat cycle. Conversely, learning seems to many trainers to be more multi-dimensional and multi-faceted. Learning is much more fragmented and often more chaotic than a circle suggests.

Selecting different training and learning methods

We could construct a tentative taxonomy of learning methods for, say, information professionals:

- practice and repetition
- reflection
- observation and copying
- feedback
- transfer
- stretching activities
- perspective changing/switching
- mentor/coach interaction
- unconscious absorption
- use of psychological devices/mental tricks
- articulation
- collaboration.

Having the opportunity to put something into practice immediately (not at some time in the future) is felt by most learners to be of great importance. Other researchers have even gone so far as to add one-to-one coaching after a formal training programme in order to enable participants to implement their learning. This leads us to consider the nature of learning in action:

- Learning is gained from action in real situations.
- Learning and understanding come from reflection.
- Learning is often greater in the company of others who are also learning.
- People's own work situations usually offer the best material for learning.
- Management must be committed to the process and its benefits.

In particular, we can identify certain functions of a particularly effective method, namely the *action learning set*:

- Everyone in the set receives mutual support and encouragement.
- Every group member can ask questions and make suggestions.
- Each set member can ask for help from others.
- Each group member is responsible for the discipline of the set.
- The set should regularly review both the process and the progress.
- Common ownership of individual problems is developed.
- Issues of power are not allowed, but peer pressure challenges the individual to perform.
- People are encouraged to contribute a wide range of experience.
- Problems are tackled from different perspectives.
- Set meetings are used as a test-bed for new ideas.

And this will raise specific issues for an action learning set *facilitator*:

- Address emotions in the here and now.

- Prioritise and negotiate the use of time.
- Employ a variety of planning techniques.
- Discuss and agree the ground rules.
- Facilitate the tone – an appropriate setting, free from interruptions.
- Begin with where people are at the moment – problems and successes.
- Question – confront issues, not people; challenge assumptions.
- Concentrate on process issues.
- Review regularly to ascertain the learning gain.
- Examine relevance and appropriateness of contributions.
- Plan for action – avoid discussion for its own sake.
- Record and review actions and decisions regularly.

What could help us in the selection of different training and learning methods? Cole (1993) offers a helpful analysis, which is reproduced in Table 18 on page 80.

A further example of categorisation comes from Wilson (1999):

- attending short courses, seminars, workshops, conferences
- being coached by a more experienced colleague
- forming a learning agreement
- establishing a mentorship relationship
- participating in a learning/support group
- teamworking
- undertaking a special project, assignment or consultancy
- taking on a new area of responsibility
- changing work practices or systems
- a variety of on-the-job methods such as focused staff meetings, reading, discussion, reflection, observation and maintenance of a learning log
- undertaking a research contract
- seeking and receiving feedback
- engaging in action research
- action learning sets
- qualification courses – educational eg MBA, masters degrees, or vocational programmes
- outdoor management development (OMD)
- development portfolios
- a secondment or exchange
- critical incident techniques
- SWOT analysis – strengths weaknesses, opportunities, threats
- specialist development consultants
- providing cover, deputising, shadowing.

Finally, Wilson (1999) underlines various steps that are important when selecting learning methods:

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Table 18 *Training and learning methods*

On-the-job training methods	Advantages	Disadvantages
On-the-job instruction	Relevant; develops trainee–supervisor links	Noise, bustle and pressure of workplace
Coaching	Job-related; develops boss–subordinate relationship	Subject to work pressures; may be done piecemeal
Counselling	Employee needs help and boss provides it	Counselling skills have to be developed
Delegation by boss	Increases scope of job; provides greater motivation	Employees may make mistakes or fail to achieve task
Secondment	Increases experience of employee; creates new interest	Employee may not succeed in new position
Guided projects/action learning	Increases knowledge and skills in work situation, but under guidance	Finding suitable guides and mentors
Off-the-job training methods	Advantages	Disadvantages
<i>(a) In-company</i>		
Lectures/talks	Useful for factual information	One-way emphasis; little participation
Group discussions	Useful for generating ideas and solutions	Requires adequate leadership
Role-playing exercises	Useful for developing social skills	Requires careful organising; giving tactful feedback is not easy
Skills development exercises eg manual operations, communication skills etc.	A safe way to practise key skills	Careful organisation required
<i>(b) External</i>		
College courses (long)	Leads to qualification; comprehensive coverage of theory; wide range of teaching methods	Length of training time; not enough practical work
College courses (short)	Supplement in-company training; independent of internal politics	May not meet client's needs precisely enough
Consultants/other training organisations	Clients' needs given high priority; fills gaps in company provision; good range of teaching methods	Can be expensive; may rely heavily on 'packages'

Marchington and Wilkinson (1996), on the other hand, prefer to categorise training and learning methods according to two dimensions, namely pedagogical/andragogical, and individually or group-based, as shown in Figure 19.

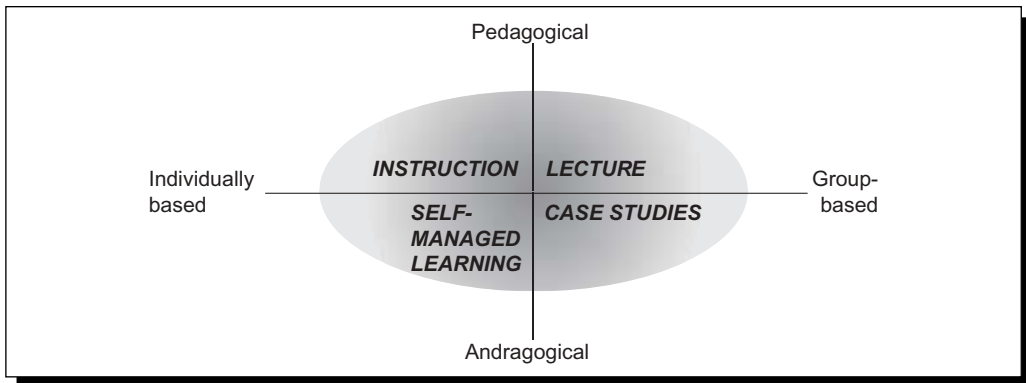


Figure 19 Plotting learning methods

1. Consider carefully all the information from the assessment of training needs.
2. Examine in detail the aims and objectives – break them down into their constituent parts.
3. Decide on specific content – and themes.
4. Consider any constraints and opportunities and make the learning in keeping with the group.
5. Consider creating a good learning atmosphere – the physical and psychological setting.
6. Choose, modify or create learning methods.
7. Organise and check the sequence of all the methods.
8. Consider all the things that might go wrong or not work and plan for contingencies.
9. Consider methods that help the programme review, and support the transfer of learning.
10. Evaluate everything – make notes on your computer about training methods improvements while they are fresh in your mind.
11. Feedback all this information into future course designs.

PAUSE FOR THOUGHT

It would be possible to plot a large number of different learning methods against the axes illustrated in Figure 19. On a separate piece of paper, draw these two axes right now and try to map the following management development interventions (Woodall and Winstanley 1998):

<p>On-the-job methods</p> <ul style="list-style-type: none"> ■ Action learning ■ Coaching ■ Mentoring ■ Sponsorship ■ Role-modelling ■ Job enrichment ■ Job rotation ■ Secondment ■ Special projects ■ Task forces ■ Deputising ■ Networking ■ Visioning 	<p>Off-the-job methods</p> <ul style="list-style-type: none"> ■ Management education ■ Qualifications ■ Short courses ■ Seminars ■ In-company management training ■ Workshops ■ Seminars ■ 'Academies' ■ External providers ■ Specialist packages ■ Outdoor development 	<p>Techniques used in off-the-job management development</p> <ul style="list-style-type: none"> ■ Lectures/presentations ■ Case studies ■ Syndicate/discussion groups ■ Distance/open learning ■ Work-related projects ■ Games and simulations ■ Role-plays ■ Individual/group presentations ■ External speakers
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Selecting different training and learning media and materials

Helpfully, Woodall and Winstanley (1998) describe the learning processes involved in a variety of learning methods. This will help the learning practitioner in the task of selecting appropriate media and materials:

Table 19 *Learning processes*

Method	Learning process
<i>Learning from another person</i> Coaching Mentoring and sponsorship Role models	Feedback, reflection, challenge Support, advice, feedback, opportunity, challenge Observation, reflection, imitation
<i>Learning from tasks</i> Special projects Job rotation Shadowing Secondment Acting-up delegation	Problem-solving, taking responsibility, taking risks and making decisions, managing without mastering Exposure to other cultures and points of view Observation of tasks, new techniques, skills Exposure to other cultures and points of view Trial of new tasks and skills, challenge
<i>Learning with others</i> Task forces/working parties Action learning Networking	Strategic understanding, building awareness and confidence Problem-solving, interaction, influencing Interaction and building awareness

So, the choice of media must be determined firstly by the learning outcomes and secondly by the learners' entry behaviour. Once these two essential variables have been ascertained, then the selection of learning media becomes much easier.

At this point it is worth reflecting on some of the advantages and disadvantages of learning materials, from the learner's viewpoint. For example, Table 20 shows an analysis of open and distance learning (ODL) (Wilson 1999).

Table 20 *Example analysis of a training method – open and distance learning*

Potential advantages	Potential disadvantages
Access to learning materials and programmes may be easier.	There may be less guidance on the level, relevance and appropriateness of learning materials and programmes.
Learning may be achieved on a flexible basis in terms of time.	Lack of time-tabled classes may lead to learning being neglected.
Learning can be carried out at a pace to suit the learner.	Lack of a clear timetable may lead to learning taking place too slowly, and ultimately petering out.
Learning may be achieved on a flexible basis in terms of place.	No suitable place for learning may be identifiable.
Learning can be carried out in one's own time.	No designated time is allowed (eg by employers for work-related learning).

Learning programmes may be tailored to individual's needs.	Employer's needs may be inadequately covered without this being recognised by learners.
Cognitive learning at one's own pace may be very effective.	Learning in the effectiveness and skills domains may be difficult to achieve.
ODL encourages autonomy in learning.	Lack of tutor support may lead to loss of motivation and failure to overcome learning blocks.
The absence of 'lessons' can make ODL less 'intimidatory'.	Lack of 'lessons' may lead to lack of discipline in study.
There is less chance of interpersonal conflict with tutors.	Informal mentoring relationships are unlikely to develop.
Lack of face-to-face involvement with tutors and learners may be helpful to introverts.	Lack of opportunity for comradeship, and peer learning may be demotivating.
Learning programmes and materials may be better structured and of high quality in terms of content and presentation.	Programmes and materials may be expensive, not tailored, out-of-date or even of poor quality. They may be over-dependent on one form of presentation.
Learning via new technologies can be exciting and motivating.	New technologies may involved high equipment or software costs, and can be daunting to learners.
Virtual reality systems can helpfully stimulate environments for learning which are difficult to achieve otherwise.	Such systems may be used as cheaper and poorer substitutes for experiential learning in real environments.
Assessment methods may be better thought out and more clearly explained.	Learners may still have difficulty determining what is required in assessments and less opportunity to negotiate these.

PAUSE FOR THOUGHT

Choose another type of learning medium. Carry out a similar analysis to that shown in Table 19.

Medium:

Advantages	Disadvantages

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Supporting learning processes

In Figure 20, Barclay (1996) highlights two specific points in the learning cycle when help with learning is particularly important.

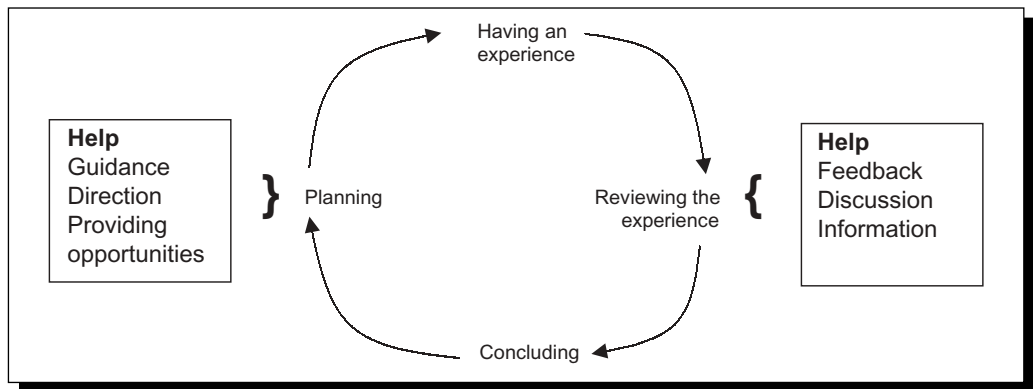


Figure 20 Supporting learning processes

THE DESIGN OF TRAINING EVENTS – IN PRACTICE

Achieving collaborative training designs

Successful learning design can fundamentally change an employee's effectiveness at work. For example, Cheetham and Chivers (2001) tell us:

A number of interviewees spoke of early difficulties that were overcome by subsequent high levels of exposure to the very thing they found difficult. Several examples were offered. A physiotherapist, who had initially found it hard to control her emotions when dealing with severely sick or handicapped patients, found she had overcome this problem after a period working at a hospice where everyone was terminally ill.

A hospital doctor who had initially found making clinical decisions difficult had a period supervising critically ill patients in an intensive care unit. After this, in her own words, 'no-one seemed ill anymore.'

A civil servant had worked for a time in the personnel function and had volunteered to be a 'guinea pig' interviewee for the training of promotion panel members. As a result of being the interviewee in dozens of mock panels, she claimed she had completely lost her fear of interviews and similar situations.

Achieving collaborative training designs involves deliberate interrogation of stakeholders. By connecting with those people who are most likely to be affected by the outcomes, trainers are more likely to be able to achieve their aims. We must, therefore, engage others in a process of questioning dialogue.

In order to be able to design a learning event effectively, there are seven questions that need to be asked. And if these questions are asked appropriately and sensitively, of the right people, in the right way, at the right time, and if the trainer or manager succeeds in achieving a good range of responses, then I believe that this structure will facilitate the design of any learning event for any learner, in any organisation, at any time.

Firstly, you need to ask Who?

Who is the training for? In addition, who is going to undertake it? Who is the learner, or who are the learners? How many of them are there, and what are their characteristics? You need to be able to identify learner entry behaviour and this will include a wide variety of different issues including their previous experience, their experience in the job, and their experience in the organisation. It will also include their experience of similar tasks outside, and their experience of training and education.

Additionally, you need to find out something about their current level of knowledge, skills and attitudes, and how these have been developed. You may need to know something about their seniority, or how long they have been with the organisation. You would certainly need to discover something about their motivation. Are they being sent? Have they self-nominated? How does this learning event fit in with their personal development plans or succession plans? Will they be rewarded for their learning? In addition, you need to find something out about their learning styles. Different people have preferences to learn in different ways, and certainly, specific skills and certain knowledge are best learnt in different ways. Moreover, if there is more than one learner with this need, will they be learning in groups, and if so, how many will there be in a group?

What about the competences of the trainer(s)? What are their current levels of relevant knowledge, skills and attitudes? If the line manager or supervisor is involved, do they have the training skills as well as the technical knowledge? If an external consultant is being asked to undertake the delivery, does she understand the necessary organisational context?

Secondly, you need to ask Why?

Having thought about the learner, you must then determine the learning objective. What is the purpose? What is the outcome? What is the goal and aim? In what way do you want the employee to be able to improve? A good learning objective needs to be *behavioural* in approach. That is to say, because we are focusing on *performance* improvement, the statement of an objective must have at its core a verb. It is something that the worker will *do* as a result of the learning and training; better still, it is something that they can demonstrate, and which can be observed and measured. In addition, there will be two qualifications – firstly, the *conditions* under which that performance is accomplished, and secondly, the *standard* that is expected. So, taken together, performance, conditions, and standards will make an effective learning objective, stated in behavioural terms, and observable and measurable. In addition, these objectives must flow from, and be aligned with, the team and departmental plans, and with the organisational strategy.

Many trainers find writing behavioural objectives quite difficult at first. Table 21 on pages 86–88 contains a valuable aid (Clark 1999) that you might want to use.

Thirdly, you need to ask What?

What do you want the learner specifically to know, or to be able to do? That is to say, the content or syllabus – how much do you want them to increase by? In establishing the content, by definition what you are delimiting is what you *don't* want them to do on this learning occasion. You are drawing boundaries; you are setting limits. Most training designers are over-ambitious. They try to cram far too much into too short a period of time. This is often for justifiable reasons, and mostly because of short-term economics. However, for training and learning to be effective, rather than just efficient, it is often in the limiting of content that great gains can be made. So how do you prioritise, how can you limit or select what should go in to a plan, and what can be left out? Perhaps the material could be kept until another time, another course, or another learning event.

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Table 21 *Writing behavioural objectives*

Cognitive domain (knowledge)	
<p>The cognitive domain involves knowledge and the development of intellectual skills. This includes the recall or recognition of facts, procedural patterns and concepts that serve in the development of intellectual abilities and skills. There are six major categories, which are listed in order below, starting from the simplest behaviour to the most complex. The categories can be thought of as degrees of difficulties. That is, the first one must be mastered before the next one can take place.</p>	
<p>Knowledge: Recall of data</p>	<p>Examples: Recites a policy. Quotes prices from memory to a customer. Lists the safety rules</p> <p>Key words: defines, describes, identifies, labels, lists, matches, names, outlines, recalls, recognises, reproduces, selects, states.</p>
<p>Comprehension: Understanding the meaning, translation, interpolation, and interpretation of instructions and problems. Stating a problem in one's own words</p>	<p>Examples: Rewrites the principles of test writing. Explains in one's own words the steps for performing a complex task. Translates an equation into a computer spreadsheet</p> <p>Key words: comprehends, converts, defends, distinguishes, estimates, explains, extends, generalises, gives examples, infers, interprets, paraphrases, predicts, rewrites, summarises, and translates.</p>
<p>Application: Using a concept in a new situation or unprompted use of an abstraction. Applying what was learned in the classroom to novel situations in the workplace</p>	<p>Examples: Uses a manual to calculate an employee's vacation time. Applies laws of statistics to evaluate the reliability of a written test</p> <p>Key words: applies, changes, computes, constructs, demonstrates, discovers, manipulates, modifies, operates, predicts, prepares, produces, relates, shows, solves, uses.</p>
<p>Analysis: Separating material or concepts into component parts so that its organisational structure may be understood. Distinguishing between facts and inferences</p>	<p>Examples: Troubleshoot a piece of equipment by using logical deduction. Recognises fallacies in reasoning. Gathers information from a department and selects the required tasks for training</p> <p>Key words: analyses, breaks down, compares, contrasts, uses diagrams, deconstructs, differentiates, distinguishes, identifies, illustrates, infers, outlines, relates, selects, separates.</p>
<p>Synthesis: Building a structure or pattern from diverse elements. Putting parts together to form a whole, with emphasis on creating a new meaning or structure</p>	<p>Examples: Writes a company operations or process manual. Designs a machine to perform a specific task. Integrates training from several sources to solve a problem. Revises a process to improve the outcome</p> <p>Key words: categorises, combines, compiles, composes, creates, devises, designs, explains, generates, modifies, organises, plans, rearranges, reconstructs, relates, reorganises, revises, rewrites, summarises, tells, writes.</p>
<p>Evaluation: Making judgements about the value of ideas or materials</p>	<p>Examples: Selects the most effective solution. Hires the most qualified candidate. Explains and justify a new budget</p> <p>Key words: appraises, compares, concludes, contrasts, criticises, critiques, defends, describes, discriminates, evaluates, explains, interprets, justifies, relates, summarises, supports</p>

(contd)

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Table 21 *continued*

Psychomotor domain (skills)	
<p>The psychomotor domain includes physical movement, co-ordination, and the use of the motor-skill areas. Development of these skills requires practice and is measured in terms of speed, precision, distance, procedures, or techniques in execution. The seven major categories are listed in order of increasing complexity and innovation.</p>	
<p>Perception: The ability to use sensory cues to guide motor activity. This ranges from sensory stimulation, through cue selection, to translation</p>	<p>Examples: Detects non-verbal communication cues. Estimate where a ball will land after it is thrown and then moving to the correct location to catch the ball. Adjusts heat of stove to correct temperature by smell and taste of food. Adjusts the height of the forks on a forklift by comparing where the forks are in relation to the pallet</p> <p>Key words: chooses, describes, detects, differentiates, distinguishes, identifies, isolates, relates, selects.</p>
<p>Set: Readiness to act. It includes mental, physical and emotional sets. These three sets are dispositions that predetermined a person's response to different situations (sometimes called mindsets)</p>	<p>Examples: Knows and acts on a sequence of steps in a manufacturing process. Recognises own abilities and limitations. Shows desire to learn a new process.</p> <p>Key words: begins, displays, explains, moves, proceeds, reacts, shows, states, volunteers</p>
<p>Guided response: The early stages in learning a complex skill that includes imitation and trial and error. Adequacy of performance is achieved by practising</p>	<p>Examples: Performs a mathematical equation as demonstrated. Follows instructions to build a model. Responds to hand-signals of instructor while learning to operate a forklift</p> <p>Key words: copes, traces, follows, react, reproduce, responds</p>
<p>Mechanism: This is the intermediate stage in learning a complex skill. Learned responses have become habitual and the movements can be performed with some confidence and proficiency</p>	<p>Examples: Uses a personal computer. Repairs a leaking tap. Drives a car</p> <p>Key words: assembles, calibrates, constructs, dismantles, displays, fastens, fixes, grinds, heats, manipulates, measures, mends, mixes, organises, sketches.</p>
<p>Complex overt response: The skilful performance of motor acts that involve complex movement patterns. Proficiency is indicated by a quick, accurate and highly coordinated performance, requiring a minimum of energy. This category includes performing without hesitation, and automatic performance. For example, players often utter sounds of satisfaction or expletives as soon as they hit a tennis ball or kick a football, because they can tell by the feel of the act what the result will produce</p>	<p>Examples: Manoeuvres a car into a tight parallel-parking spot. Operates a computer quickly and accurately. Displays tone and feeling while playing the piano</p> <p>Key words: assembles, builds, calibrates, constructs, dismantles, displays, fastens, fixes, grinds, heats, manipulates, measures, mends, mixes, organises, sketches.</p> <p>NOTE: the key words are the same as under Mechanism, but will have adverbs or adjectives that indicate that the performance is quicker, better, more accurate, etc.</p>
<p>Adaptation: Skills are well developed and the individual can modify movement patterns to fit special requirements</p>	<p>Examples: Responds effectively to unexpected experiences. Modifies instruction to meet the needs of the learners. Perform a task with a machine that it was not originally intended to do</p> <p>Key words: adapts, alters, changes, rearranges, reorganises, revises, varies.</p>
<p>Origination: Creating new movement patterns to fit a particular situation or specific problem. Learning outcomes emphasise creativity based upon highly developed skills</p>	<p>Examples: Constructs a new theory. Develops a new and comprehensive training programming. Creates a new gymnastic routine</p> <p>Key words: arranges, builds, combines, composes, constructs, creates, designs, initiate, makes, originates.</p>

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Table 21 *continued*

Affective domain (attitudes)	
<p>This domain includes the manner in which we deal with things emotionally, such as feelings, values, appreciation, enthusiasm, motivation, and attitudes.</p>	
<p>Receiving phenomena: Awareness, willingness to hear, selected attention</p>	<p>Examples: Listens to others with respect. Listens for and remember the names of newly introduced people</p> <p>Key words: asks, chooses, describes, follows, gives, holds, identifies, locates, names, points to, selects, sits, erects, relies, uses</p>
<p>Responding to phenomena: Active participation on the part of the learner. Attends and reacts to a particular phenomenon. Learning outcomes may emphasise compliance in responding, willingness to respond, or satisfaction in responding</p>	<p>Examples: Participates in class discussions. Gives a presentation. Questions new ideals, concepts, models etc in order to fully understand them. Knows the safety rules and practises them</p> <p>Key words: answers, assists, aids, complies, conforms, discusses, greets, helps, labels, performs, practises, presents, reads, recites, reports, selects, tells, writes.</p>
<p>Valuing: The worth or value a person attaches to a particular object, phenomenon, or behaviour. This ranges from simple acceptance of the more complex state of commitment. Valuing is based on the internalisation of a set of specified values, while clues to these values are expressed in the learner's overt behaviour and are often identifiable</p>	<p>Examples: Demonstrates belief in the democratic process. Is sensitive towards individual and cultural difference. Shows the ability to solve problems. Proposes a plan for social improvement and follows through with commitment. Informs management on matters that the learner feels strongly about</p> <p>Key words: completes, demonstrates, differentiates, explains, follows, forms, initiates, invites, joins, justifies, proposes, reads, reports, selects, shares, studies, works</p>
<p>Organisation: This means organising values into priorities by contrasting different values, resolving conflicts between them and creating a unique value system. The emphasis is on comparing, relating and synthesising values</p>	<p>Examples: Recognises the need for balance between freedom and responsible behaviour. Accepts responsibility for one's behaviour. Explains the role of systematic planning in solving problems. Accepts professional ethical standards. Creates a life plan in harmony with abilities, interests and beliefs. Prioritises time effectively to meet the needs of the organisation, family and self</p> <p>Key words: adheres, alters, arranges, combines, compares, completes, defends, explains, formulates, generalises, identifies, integrates, modifies, orders, organises, prepares, relates, synthesises</p>
<p>Internalising values: The learner gains a value system that controls their behaviour. The behaviour is pervasive, consistent, predictable, and most importantly, characteristic of the learner. Instructional objectives are concerned with the learner's general patterns of adjustment (personal, social, emotional)</p>	<p>Examples: Shows self-reliance when working independently. Co-operates in group activities. Uses an objective approach in problem-solving. Displays a professional commitment to ethical practice on a daily basis. Revises judgements and changes behaviour in light of new evidence. Values people for what they are, not how they look</p> <p>Key words: acts, discriminates, displays, influences, listens, modifies, performs, practices, proposes, qualifies, questions, revises, serves, solves, verifies</p>

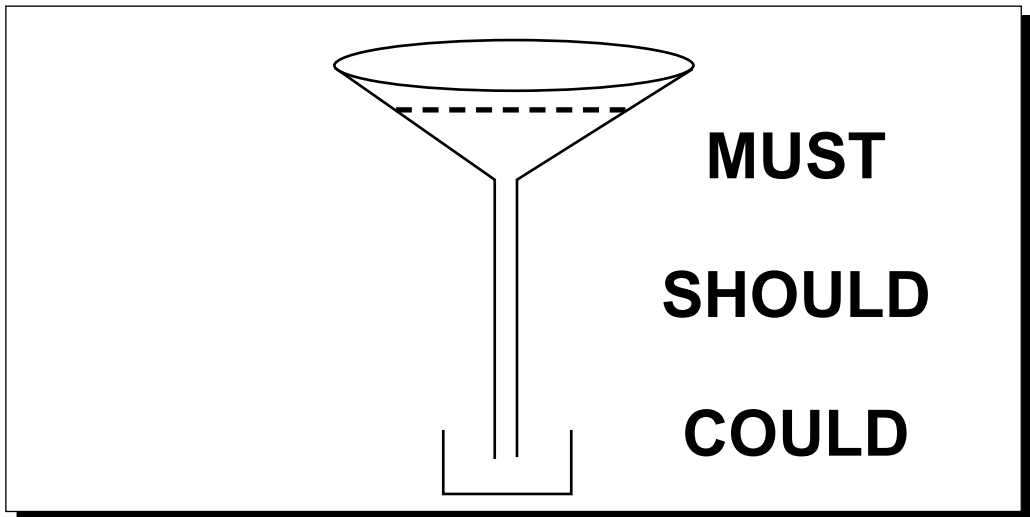


Figure 21 *Prioritising content*

I liken the method of prioritising content to a funnel, or a filtration process, like that shown in Figure 21. At the very top there are those things that 'must' be included, core competences, if you like; those essential elements that are fundamental to the achievement of the task, for the increase in knowledge, for the development of attitudes, and the enhancement of skills. And after 'must', comes 'should'. These are those things you ought to include if you have time, and if the learner has the ability and the motivation, or if the group comes together, and works together effectively. Those are things that are available to develop the learning further. Finally, 'could'. These might be the added extras, maybe through handouts, or distance, open and flexible learning, e-learning or blended learning. They may be the additional and complementary aspects of the learning that are unlikely to take place in an off-the-job setting. They might be enhanced through further coaching and mentoring back in the workplace. Perhaps the learner will take advantage of private reading, listening to tapes, or watching videos.

Therefore, it is by using this filtration method, down through the funnel, that you are better able to select what is appropriate and relevant.

PAUSE FOR THOUGHT

Knowing the three types of learning objective and what they represent, as outlined in Table 21, will aid you when selecting learning strategies. Review this classification of objectives. Now select a learning event with which you have been involved recently, and rewrite one of its objectives. Include in your objective the essential components of performance, conditions and standards. For example:

'Wordprocess a coursework assignment, from written notes, using Microsoft Word[®], ready for submission, by the end of the week.'

Performance:

Conditions:

Standards:

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Another way to select content is through the Pareto principle, the 80/20 syndrome. Because, in each worker's job, in each team's task, in each organisation's strategy, 80 per cent of what needs to be accomplished will be carried out in only 20 per cent of the key tasks. So, what is core, what is fundamental, what is imperative? Moreover, the employees know well enough what those key results areas are.

The fourth question is Where?

Where is the learning going to take place? Is it going to be in the workplace? On the job? At the workstation? By the machine? In the factory? In the office? Is it going to be when you are driving or flying to a meeting? Or is it going to be off the job, in a training room, a classroom, a simulator, a conference hall? Perhaps the learning will be at home, or in a hotel room. In addition, there are big differences and big gains to be had in all these different settings. Leaving aside the safety aspects of flight simulators and the need to help pilots practise using a 747 before they do it for real, or perhaps driving an underground train in a simulator first of all, there are many similarities that can be drawn between using a simulator and practising running a business. Learning often includes rehearsing how to lead teams, or trying out skills of negotiation, in an off-the-job, relatively safe, environment.

Having said that, most learning takes place on the job. Most people learn most things most of the time by trying it out. As an approach to learning, it is justifiable. The problem is, it is quite expensive, in the use of resource, time, money, facilities, materials, and equipment. It is also expensive in terms of consequential loss, or mistakes, lost customers, downtime, accidents, and wastage rates. It's expensive in terms of what the learner hopes to accomplish, and this can lead to frustration and anger, as well as loss of self-esteem and self-worth. It can be expensive in organisational terms because of the effect it has on relationships of people in the team, or other departments, and other stakeholders.

Nevertheless, learning in the workplace is often very effective if it is well structured and approached in a professional manner. Because the learner identifies a need and if that need can be met in a realistic and timely manner, then it is likely to have greater long-term benefits. But, this will only be effective if the learners themselves see a need, a problem, or a difficulty and also have access to a mentor, a coach, a manager, a supervisor, a colleague or a peer, or a trainer. And if that need can be met where they are working, they will see the relevance and importance more quickly than if it is carried out in a rarefied atmosphere of a training room, conference centre or hotel suite.

On the other hand, it is often better to take learners away from the working environment because of all the distractions, noise, interruptions, lack of space, and lack of opportunity to focus and concentrate on the learning issues. That is why quite a lot of training is actually carried out away from work, sometimes in the employees' own time. Therefore, a lot of training happens in an unusual setting. It is an artificial arrangement and therefore the trainer, coach, or instructor needs to work extremely hard at helping the learner to transfer that learning back into the work place.

There are advantages of having a training department on the premises, in the working situation, either in the department, or in the office, at region, or headquarters. Because then, the organisational culture, the framework, the product knowledge and understanding of systems and processes will be specific. Increasingly, trainers are using learning resource centres, e-learning, or the company's intranet, in order to facilitate learning that is culturally specific to the organisation. One of the major problems of work these days is that there are great demands upon most people to achieve so much more in so much less time. Therefore, the temptation is great at coffee and lunch breaks during an off-the-job course to 'pop back' to the office, and then either not to return, or to return late for the training, whereas, in a hotel or a conference centre, at least that temptation is reduced.

Consequently, a lot of training is still carried out in those environments, which have the added advantage of being separated from the distractions of the working environment. However, in those kinds of settings

there are many other problems. There is much greater loss of control for the trainer in the practical arrangements of desks, chairs, overhead projectors and the use of PowerPoint®. They will have far less power over where and when the tea and coffee will be served. They will have less influence over the quality of the lunch, and when the learners will arrive, and what the accommodation and other facilities might be like. So, there is much greater scope for all the peripheral aspects of the programme to reduce the benefit of the learning itself.

Increasingly training is undertaken not in the workplace, or in a conference centre, but can be undertaken virtually anywhere. And by 'virtually', I mean not just the electronic aspects of e-learning, or on the Internet at home; but by the use of satellites and distributed learning systems; the use of mobile phones and PDAs; the use of interactive television, and CD-ROM, or DVD; or by the use of cassettes and CDs in the car. Certainly, one of the fundamental aspects of the Government's Learndirect and University for Industry is that learning needs be distributed more equitably, to take place *outside* the normal institutions and settings that people have become used to. So that, there are opportunities for people to use facilities to develop their knowledge, skills and attitudes in the home, pub, club, school hall, empty church hall or an Internet café.

Where learning takes place is very important, because again it's about empowering the learner to take responsibility for their learning at a place and a time to suit them, and in a way that appeals to their different learning styles, in bite-size chunks that they can cope with, and specific to their current learning needs. So, increasingly, it is known as *just-in-time* learning. If an employee has a difficulty or a problem in the workplace, it can be possible for them to phone, fax, or e-mail somebody to help them. It is also possible for them to use a CD-ROM on their own machine, or on a server. They could access the Internet, intranet, or extranet. Perhaps they could access a learning resource centre and read a book, use a workbook, watch a video, or have a discussion. It is possible for them to borrow a cassette tape or use video-conferencing or satellite systems to discuss the nature of the problem with others. None of this learning has taken place in a traditional training room or classroom. So, increasingly, learning is not limited by space or location.

The fifth question that needs to be asked is When?

At what time will the learning take place? What time of day? Which day of the week? Or week of the month, or month of the year? All these questions have a strange yet marked influence on our learning and our training.

The time of day is very important for learning. Without going into the whole nature of biorhythms, we can nevertheless see that some people learn better at different times of the day. You may remember that, at school, often Maths was taught in the morning and English in the afternoon. Many people prefer to learn and be trained early in the morning. Some people wake quickly, expectantly, hopefully, and a number of writers that I know do their best work immediately on waking in the morning. Others of us, . . . well, we take longer to wake up, but some of our best time for learning is in the evening. Yes, we may have put in a hard day's work, but somehow the ability to develop, grow, and mature is easier in the evening. Just look at the large number of students who undertake part-time courses, often coming twice a week for two years! And yes, it has to be acknowledged, that many of them also seem to do their best assignments at two o'clock in the morning, just before the hand-in date!

So, we learn differently, at various times of the day. In addition, it is well known, that straight after lunch is often not a good time to learn. That is why trainers are so often urged not to show a video at that time; the post-prandial stupor is difficult for learning! Therefore, at that particular time of day, a good trainer will often put an activity into the design of the programme.

Another aspect of learning, since we are considering time, is the length of adult concentration spans. No doubt, we have seen many times the classic learning curve, and people talk glibly about a difficulty in a new

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job or in a new situation as being on 'a steep learning curve'. However, just as there is a learning curve, there is also a *forgetting* curve. Adults, generally speaking, cannot concentrate on any one piece of learning for longer than about 20 minutes, before there is a need to change the texture of the design. Therefore, after a short period of input, there is a need for discussion or questioning, for a case study or skills development exercise. Another aspect as we are considering time and learning is: how often and how many times will the training take place? That is to say, will the learning be concentrated in one large chunk, or will it be split into smaller parts, modules, sessions, seminars, and workshops.

When can people be released from work? How often are they able to get away? Is it going to be for half a day, a whole day, or longer? We know that in most organisations two or three days is the maximum that people can be released from the workplace these days. Some organisations are now experimenting with mini-sessions lasting just one or two hours. These are repeated during the day, and the learners just arrive at the training room without booking an appointment. If there is a spare space, they can join in with the session, and if not, then they can come back later.

For most organisations, gone are the days of the one- or even two-week residential course. However, there is still much to be gained from staying at a hotel or conference centre overnight, particularly in relation to the intangible, social, relational elements of the learning. This can be crucial for attitudinal development.

Considering aspects of time, it is also important to consider the day of the week, month, season or year, because different departments and functions are busier at different times, and therefore the availability of learners is reduced. It is impossible to get people from finance, for example, to be released for training courses just before the financial year-end. In addition, in the whole of the retail sector, it is very difficult for people to be released to go on training courses in November/December. Similar problems exist at other times of the year in the travel industry.

Therefore, we can see that time is very important when we are considering learning design. But an element that is often overlooked is the needs of the non-employed, that is to say, the casual, the temporary, and the job-share worker. What about people on shift work, perhaps nurses on permanent night shift in a hospital. Are they required to come on *our* courses at *our* times, starting at 9.30 in the morning? Furthermore, what about the needs of single parents? What are the implications for them? Can they suddenly be expected to change their normal work pattern to fit in with our agendas?

The amount of time given over to learning is usually less than is required. Time is money – yes! But, far too often, money determines the training or the learning. Unfortunately, many trainers start with the amount of time that is available and try to shoehorn into it all the learning that is required. It is far better to start with the learners, their needs, and their objectives, and what is to be achieved – and then to say: 'What is manageable within the time?'

The sixth crucial question is Which?

Which learning strategy? In what way will the learners be helped to develop? That is to say, within the organisational strategy, the HR policy and plans, and the training philosophy, there need to be statements made concerning the overall learning strategy for all the employees, or certain groups of employees. For example, it could be that the whole organisation, or the HR department, the accounts office or the regional store decides that everybody under the age of 21 will be given time to go on day-release to the local college, to obtain a qualification, perhaps linked to NVQs, modern apprenticeships or A-levels. Another strategy could be to do with e-learning; it could be decided, say, that every employee in the headquarters building will be given access to an intranet-based set of modules. Alternatively, a strategy that might affect a particular group of workers could be for middle and senior managers to have the right to go on a Diploma in Management Studies course or MBA programme.

PAUSE FOR THOUGHT

This real case study looks at the learning needs of two very similar groups of people, called clinical supervisors, in two different NHS trusts. The training design for these people was based on very similar identified learning needs. However, you can see that the time allotted in one example is twice that which was given over to the other group. Carry out an assessment of these training designs:

	'X' COMMUNITY HEALTH PROGRAMME	'Y' UNIVERSITY and 'Z' HOSPITAL PROGRAMME
OBJECTIVES and ASSESSMENT	<ul style="list-style-type: none"> ■ On-course learning contract ■ Self- and peer assessment ■ End of each workshop evaluations 	<ul style="list-style-type: none"> ■ Critically analyse the role and function of the clinical supervisor ■ Appraise a variety of clinical supervision models ■ Appraise the outcomes of clinical supervision ■ Identify own strengths and weaknesses as a facilitator ■ Demonstrate effective use of supervisory skills in both the group and individual supervision settings ■ Examine the ethical, legal and cultural issues within clinical supervision ■ Identify and apply appropriate documentation procedures ■ End of each day evaluations
CONTENT	<ul style="list-style-type: none"> ■ Overview of supervision ■ Six categories of intervention ■ Group facilitation ■ Criteria for effectiveness 	<ul style="list-style-type: none"> ■ Role of supervisor/supervisee ■ Functions of supervision ■ Group dynamics ■ Boundary negotiation/agreeing a contract ■ Ethical dilemmas ■ Transference ■ Communication patterning within supervision
LEARNING STRATEGY	<ul style="list-style-type: none"> ■ Pre-course open learning ■ On-job application ■ Off-job workshops 	<ul style="list-style-type: none"> ■ Post-course open learning ■ Off-job workshop
LEARNING METHODS	<ul style="list-style-type: none"> ■ Tutor inputs ■ Skills practice ■ Review, feedback and reflection ■ Groupwork ■ Action planning 	<ul style="list-style-type: none"> ■ Experiential sessions ■ Discussion ■ Group work ■ Reflection ■ End of Day 1 homework
LOCATION	<ul style="list-style-type: none"> ■ Learner's own place ■ Off-job learning centre 	<ul style="list-style-type: none"> ■ Learner's own place ■ Off-job learning centre
TIME	<ul style="list-style-type: none"> ■ 1.5 hours open learning ■ Two x two-days (3-week gap) 	<ul style="list-style-type: none"> ■ Two hours open learning ■ One x two-day workshop

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For example, here is the assessment that I submitted to the 'X' Community Health Trust:

PROGRAMME DESIGN ASSESSMENT

1. This assessment is based solely on the written, published documents available, and the author's understanding of clinical supervision within the context of the NHS.
2. In broad terms, both programmes contain elements of good training practice, and appear to take account of several aspects of learning theory.
3. There seems to be general congruence between the explicit or implicit objectives of the programmes and the learning strategy and methods selected, although there is no indication of group size. It is recommended that such programmes should have a maximum group size of about 12, with opportunities for working in pairs, threes, fours, and sixes.
4. The author had no evidence of stated entry behaviour for the learners. It is recommended that notice should be taken of their existing knowledge, skills and attitudes; relevant experience; previous exposure to experiential learning; learning style preferences; availability; links to appraisals or personal/professional development plans; and motivation and commitment.
5. While the use of pre- or post-course open learning is commendable, there is some doubt concerning its efficacy in practice. Learners regularly do not take advantage of such provision, particularly when, as seems to be the case here, it appears to lack tutorial support, and is neither assessed nor directly referred to during the workshops.
6. The end-of-workshop and end-of-day evaluations are predictable, if disappointing. It is recommended that a complete evaluation strategy should be implemented to include internal and external validation; transfer of learning; job behaviour and performance measures; and return-on-investment calculations.
7. For the 'X' programme, the author had no evidence of stated objectives, aims or outcomes. The use of an on-course learning contract and action plans is considered good practice. The pace of the programme appears appropriate to the strategy and methods selected. There seems to be good use made of skills practice with feedback. Review and reflection are employed well. The use of self- and peer-assessment is good practice. While the provision of a gap between the two workshops is considered to be noteworthy, there may be difficulties with the availability/release of learners for Part II. In addition, the three weeks allowed is unlikely to be sufficient to give learners the opportunities necessary to apply all the learning from Part I.

OVERALL ASSESSMENT – GOOD. This programme design is likely to meet the learning needs.

8. For the 'Y/Z' programme, the author had no evidence of assessment strategies and procedures, which is disappointing considering the excellent formulation of behavioural objectives. However, it is considered that, owing to the number, range, scope and standards of the objectives, they are unlikely to be met in the time allocated. Moreover, there seems to be too little time set apart for some of the experiential learning sessions. It is difficult to see where some of the stated content is to be found in the workshop, and how some of the content relates to the objectives.

OVERALL ASSESSMENT – FAIR. This programme design is considered too ambitious for the time allocated, and unlikely to meet the learning needs.

Similarly, there could be a strategy for all professionals to be supported in developing their professional education and development at a college or university. Another strategy might concern the extent to which learning and training is carried out on the job, or off the job. Learning strategy also involves consideration of whether it is for individuals or groups. Increasingly, a major strategy decision that is being taken by many organisations concerns the outsourcing of the training function. Will there be a training department? Alternatively, will consultants be brought in?

And in order to decide which strategy to adopt, clearly there are major decisions that need to be taken at senior levels relating to resources and their allocation. Unfortunately, a number of organisations tend to take the very short-term and pragmatic view. But when the outcomes of training and learning can only be seen many months or even years later, beyond the scope of any one particular financial year, then the benefits are often neglected. So, which strategy to adopt will largely determine the nature, outcome and function of the learning.

And the final questions, How?/How much?

'How' refers to the learning methods that are available, and 'how much' is clearly to do with costs and benefits, standards and quality.

There are many, many different forms of learning methods. In Table 22 on page 96, a number of the most well known and well used are listed (Bournier and Flowers 1997). It has been said that most trainers know of about a dozen different learning methods, and only use half of them. There are in fact well over 70 different forms of learning method that could be used to increase the learning of employees at work. Moreover, according to the table, you will see that there are different learning methods that are applicable and appropriate for different learning outcomes.

Therefore, if we want the learners to *understand* certain concepts, facts or elements of knowledge, then perhaps a lecture or reading would be appropriate. But, if we then want to take the learners further to help them *apply* that knowledge and understanding, then a lecture or reading alone will be inappropriate and we must choose a different learning method for the *application* of the knowledge. That could include, for example, a case study, a discussion or a debate.

If you were asked to construct a list of participative learning methods, I wonder how many of the following (Woods and Cortada 2002) you would have included!

Application projects	Mentoring
Articles and books	Metaphors
Audiotapes (music and speaking)	Newsletter
Book groups	Participatory lecture
Brainstorming	Planned interruptive lecture
Case studies	Post-work
Chain-gang lecture	Prep-work
Challenge courses	Press conference lecture
Charts, graphs, posters	Programmed instruction lecture
Computer/web-based training	Props
Concept interference lecture	Real-time video tutorial lectures
Concert reading	Role plays
Confederate lecture	Self-analysis, reflection
Continuing learning	Sharing best practices
Demonstration	Simulation
Experiential lecture	Story
Expert call-in lecture	Study groups
Field trips	Synergic lecture
Five-minute fables	Teach back
Games	Team quiz lecture
Ice-breakers	TV and videotape
Job aids	Visualisation
Lecture in a fishbowl	Voice mail, e-mail
Magic tricks	

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Table 22 Linking learning methods to aims

Disseminate knowledge	Develop the student's capability to use ideas and information	Develop the student's ability to test ideas and evidence	Develop the student's ability to generate ideas and evidence	Facilitate the student's personal development	Develop the student's capacity to plan and manage their own learning
<ol style="list-style-type: none"> 1. Lectures 2. Up-to-date textbooks 3. Reading 4. Handouts 5. 'Guest' lectures 6. Use of exercises to find up-to-date knowledge 7. Develop skills in using library and other learning resources 8. Directed private study 9. Open learning materials 10. Use of the Internet 	<ol style="list-style-type: none"> 1. Case studies 2. Practicals 3. Work experience 4. Projects 5. Demonstrations 6. Group working 7. Simulations (eg computer-based) 8. Workshops 9. Discussion and debate 10. Essay-writing 	<ol style="list-style-type: none"> 1. Seminars and tutorials 2. Supervision 3. Presentations 4. Essays 5. Feedback on written work 6. Literature reviewing 7. Exam papers 8. Open learning 9. Peer assessment 10. Self-assessment 	<ol style="list-style-type: none"> 1. Research projects 2. Creative problem solving 3. Group working 4. Action learning 5. Lateral thinking 6. Brainstorming 7. Mind-mapping 8. Creative visualisation 9. Coaching 10. Problem-solving 	<ol style="list-style-type: none"> 1. Feedback 2. Experiential learning 3. Learning contracts 4. Action learning 5. Learning logs 6. Role-play 7. Structured experiences in groups 8. Reflective documents 9. Self-assessment 10. Profiling 	<ol style="list-style-type: none"> 1. Learning contracts 2. Projects 3. Action learning 4. Workshops 5. Mentors 6. Learning logs and diaries 7. Independent study 8. Work placement 9. Portfolio development 10. Dissertations

T E N C O M M O N L E A R N I N G M E T H O D S

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PAUSE FOR THOUGHT

For each one of the methods in the list on page 95 that you do not recognise, search the Internet for a definition and a working example. You could start with this: <http://www.trainersnetwork.org/html/lrn-method.html>.

In Figure 22, we see Martin and Jackson's (2002) illustration of three interconnected factors for consideration in the selection of training strategies.

How can this apply to the design decisions we are constantly having to make? In order to achieve learning outcomes and objectives, different methods are appropriate. For example, when I was undertaking a consultancy assignment at British Airways, they wanted to develop their senior purchasing manager's ability in advanced negotiating skills. I knew that this would involve a considerable amount of practice, skills development, and rehearsal. That takes time. My colleague and I resisted strongly the demand by the client to cut down on the length of time required for the learning event. In order to develop their negotiating skills, the learners needed time to practise these new skills in a relatively safe learning environment. Then they needed feedback, further input, and further opportunities to improve.

Increasingly, methods for learning will include not only face-to-face training, either on the job or in a training room, but organisations are increasingly using open, distance and flexible learning, which include among other materials, paper-based workbooks delivered to people so they can learn where and when they prefer. Perhaps there could also be the use of audio cassettes and videos, CD-ROMs, or DVDs, which people can have access to as they travel to work, or in their home.

Other methods will be appropriate to develop other knowledge, skills and attitudes. For example, in order to learn how to use a particular software programme, such as Microsoft® Access, we can watch somebody construct a database, or hear a lecture, read a book, study the manual, or watch a video. However, in the end, the learners need to actually use a computer themselves, in either a dedicated computer-learning suite or room, or better still, on their own machine in the workplace.

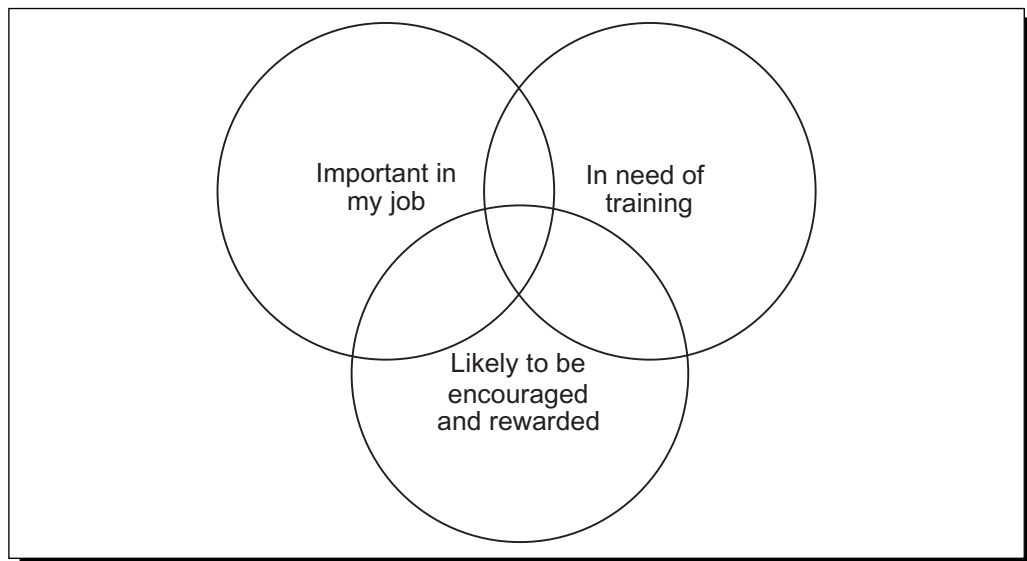


Figure 22 Selecting learning strategies

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And how much will all this cost?

It is most important to be able to justify to all stakeholders the return on investment (ROI) that such a training design will achieve. There has been a history in training circles over many years of not addressing this major issue. Consequently, this has devalued its worth in the eyes of senior management in general, and the finance director in particular! Now, at last, there is a means of adopting an approach to assessing the ROI of training and learning with which senior executives are familiar and which they regularly use in other aspects of the organisation. There are two templates that need to be used together, which you will find in Figure 23. These have been adapted from groundbreaking work by Swanson (2001).

Selecting different training and learning methods

Cheetham and Chivers (2001) catalogue for us a useful list of on-the-job learning events:

- mentoring
- learning from complex to multi-faceted problems
- innovative and pioneering experiences.
- working above grade
- working alongside more experienced colleagues
- networking
- teamworking
- multi-disciplinary working
- switching perspectives
- learning from clients/patients/customers
- learning from para-professionals
- feedback
- learning from criticism
- self-knowledge and self-image
- simulation
- learning through articulation
- learning through teaching others
- cultural transfer/cross-cultural stimulation
- extra-occupational learning and transfer
- learning by linking
- mindset changes and 'Damascus Road' experiences
- mental models, imagery and other psychological devices
- reflection
- coping with professional stress.

Such methods would seem to go a long way towards meeting user needs. Although the majority of small and medium-sized enterprises appear to be resistant to education and training, a small minority – mainly those pursuing growth – embrace training. Their requirements are twofold: an immediate menu of technical fixes for current problems, and longer-term requirements, mainly for marketing and finance. Ideally, they would like one-to-one and face-to-face tuition. This is not feasible within the cost parameters of institutionally provided training.

The outcome/worth spreadsheet			
Learning event: Training designer: Date:			
<i>Learning options</i>	<i>Option 1</i>	<i>Option 2</i>	<i>Option 3</i>
Data			
a) What is the unit of performance?			
b) What is the financial value of each unit?			
c) What is the learners' initial performance?			
d) What is the performance target at the end of the learning event?			
e) How long will it take the learners to reach the target standard?			
f) What is the period of external validation? [Enter the highest value from e]			
g) How many learners will participate in the learning event?			
Calculations			
h) How many usable units do the learners produce during the learning event? $\frac{d + c}{2}$			
i) How many usable units are produced during the development period? $h \times e$			
j) How many usable units will be produced during the total external validation period? $[(f - e) \times d] + i$			
k) What is the value of the outcome during the external validation period? $j \times b$			

Figure 23 The ROI of training and learning

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Figure 23 continued

The input/cost spreadsheet			
Learning event: Training designer: Date:			
<i>Learning options</i>	<i>Option 1</i>	<i>Option 2</i>	<i>Option 3</i>
Identify and analyse			
Diagnose performance			
Document expertise			
Contract with stakeholders			
Other			
Plan and design			
Diagnosis and feedback			
Off-the-shelf design			
Tailor-made design			
Pilot and improve			
Develop media and materials			
Other			
Implement and deliver			
Manage learning event			
Deliver learning event			
Fixed costs			
Opportunity costs			
Other			
Validation and evaluation			
Assess results			
Report results			
Follow-up performance			
Roll-out			
Other			

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Figure 23 *continued*

TOTAL input/costs			
Analysis			
<i>Learning options</i>	<i>Option 1</i>	<i>Option 2</i>	<i>Option 3</i>
TOTAL outcome/worth for all the learners [K]			
<i>Minus TOTAL input/costs</i>			
Result			

PAUSE FOR THOUGHT

Take a few moments now to reflect on a recent learning event.

Identify – for the trainer involved – the following elements, as if you were giving feedback to the trainer.

1. What did they do, in precise terms?
2. What did they do that was particularly successful?
3. What didn't work so well?
4. The next time they run this session:
 - they should avoid:
 - they should change:
 - they should include:

Effah (1998) explores some of the avenues for training and staff development. Within limited financial resources, opportunities nevertheless exist for training and staff development at the universities in Ghana. These opportunities include:

- induction/orientation on first appointment
- in-service/on-the-job training
- study visits
- staff meetings
- informal discussions with colleagues
- seminars/workshops/conferences
- job rotation
- participation in activities of professional associations

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- study leave/sabbatical/leave of absence
- consultancy
- in-house journals
- organised departmental research/individual research.

Interestingly, he sees the lack of training and learning in the higher education establishments in Ghana as not being due to the lack of opportunities:

It would seem that the major problems rather relate to a lack of co-ordination, the unsuitability of courses, a poor incentive and reward system for individual learning effort, as well as cost considerations. But by far the biggest limitation seems to be the lack of a training needs analysis.

How can this be applied in reality? Well, for example, during a total quality management (TQM) training programme, learners spend most of their time, according to research by Vermeulen and Crous (2000), on:

- communication skills
- problem-solving techniques
- quality service to customers.

It is interesting that the real issues of TQM, namely the introduction to TQM and the use of TQM tools, receive less attention from certain respondents. Contents of a TQM training programme will differ from organisation to organisation. The contents of the training programme should however always be in line with the objectives of the overall TQM programme, which is actually aimed at improving business processes. Quality training programmes should therefore centre round the basic principles of understanding the different processes in the organisation, the relationship between different processes, and eventually the improvement of these processes. Top management should foremost establish the criteria (objectives) to be followed in the design of the training programme; for example, that the training courses should be job- and outcome-oriented. The main objective of any TQM training programme should be to achieve continuous improvement in all activities.

Another way to consider how to select learning methods and techniques is to see them in the context of a basic teaching process (Wilson 1999), as in Table 23 on page 103.

Selecting different training and learning media and materials

A very useful way to help you select appropriate learning media is to use the framework in Table 24 on page 104.

With the increasing use of broadcast technology at home and for leisure, learners' expectations are being raised all the time about the quality and standards of learning materials. A poor handout that's been photocopied many times will not only be difficult to read and understand, but will reduce in the learners' eyes the quality of all the training that's delivered. When it comes to distance, open and flexible learning materials, a great deal of thought must be given to layout and format; to the visual effect of the words on the page; to the use of pictures and icons; the use of white space; and the font used.

When I was preparing for this book, I needed to read a large number of different materials, and some of them were – to be frank – difficult and off-putting, simply because of the choice of the layout and the font size. My discussions with the commissioning editor for this book have, I hope, borne fruit. I hope you are finding this easier to read and more accessible than perhaps some materials. When it comes to training

Table 23 *Selecting learning methods*

1. Examine learning objectives	2. Consider learning styles and strategies	3. Select methods	4. Design techniques	5. Prepare materials
Performance criteria Learning outcomes	Trainer-centred Learner-centred Consider planned and emergent learners Consider needs of activist, pragmatist reflector and theorist	Case study Buzz groups Syndicate Lecture Fish bowl Action maze Outdoor management development	Ice-breakers Energisers Dice games Attitude scales Role hats Deconstructing skills Closers Road shows Market place Card games Score cards	Envelopes Masking tape Washable cards Layered flipcharts Coloured pins Video cases Post-it® labels

and learning we need to strive for excellence. We need not pursue perfection, but professionalism. We need to strive for standards and quality in our materials that would be acceptable to the board of directors, senior executives and our chief customers.

In the past I've been involved in commissioning training videos. We used a professional and commercial organisation to undertake the whole project. It was fascinating to work through all the processes from original scriptwriting and storyboarding, thinking about shots and scenes, and then moving through the stage of getting the right actors. We went through the location shots and the filming and the hectic nature of all of that. And then the hard graft of post-production work with editing and sound, all the graphics and the computerised effects. And then came all the tape duplication before we were ready to use the videos for product knowledge training in a financial services environment. All these steps helped me to see that a lot of hard work is undertaken over many, many months in order to produce just a half-hour video if we are to achieve the kind of excellence that is expected. We are not here to look slick, but to be professional with our learners in a way that doesn't cause problems, and helps them to achieve their potential. We are to be thorough, and well-prepared. So, an overhead projector transparency slide that we've been using for five years is unlikely to stand the test of acceptability.

Why do we use slides anyway; why do we use the overhead projector? The same question can be asked of many different kinds of media, because different media can be used in different ways for different kinds of learning. The size of group is important, and the message and learning outcome will also determine which media are best in any given situation.

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Table 24 *Increasing retention*

Retention level (%)	Media	Learner involvement
10	Reading Books, handouts, journals, computer text	<i>Passive</i> Visual receiving <i>Sight</i>
20	Listening Lectures, audiocassettes, radio	<i>Passive</i> Aural receiving <i>Hearing</i>
30	Looking Charts, diagrams, flipcharts, whiteboards, slides, overhead projector transparencies, visualisers, data projectors	<i>Active</i> Visual receiving <i>Sight</i>
40	Following Computer graphics, transparency overlays, working models	<i>Active</i> Aural and visual receiving <i>Sight</i>
50	Watching Videos, DVDs, demonstrations, CD-ROMs, computer-generated animation	<i>Active</i> Aural and visual receiving <i>Hearing and sight</i>
60	Writing Reports, learning logs, tests, keyboards	<i>Active</i> Verbal contributing <i>Sight and touch</i>
70	Talking Discussions, 'telephone' simulator, audio cassette, computer voice recognition, DVD-I	<i>Active</i> Oral and aural contributing <i>Hearing and taste</i>
80	Practising Simulations, exercises, multimedia	<i>Active</i> Participating <i>Sight, hearing, touch, taste, and smell</i>
90	Experiencing The real job	<i>Active</i> Doing <i>Sight, hearing, taste, touch and smell</i>

If it's a small group of three, four or five people, an overhead projector will be intrusive. It is far better to use a flip chart. When the group is larger, with say 15, 20 or 30 people, an overhead projector then is essential.

How we use media is also important. I think it's important for many reasons for the trainer to be well versed in how to use a particular overhead projector, and if necessary to practise beforehand in an empty room. For the learner, there's nothing more dispiriting than for a trainer to say 'Now, where do I switch it on?' or for the projector to be switched on with no transparency being shown. Even worse is for the trainer to walk in front of the screen, or for the transparency to be put on upside down. We know these things, we've been there, and we've seen it. And our heart sinks, and we stop learning.

When the group increases beyond about 30 or 40 people, it's important to consider whether an overhead projector is going to be effective enough. Perhaps we need to consider using instead a video projector or data projector, linked to a laptop or console computer. That enables us to use perhaps PowerPoint® slides. But with every step up, there is increasingly the temptation to become more sophisticated and to invest many hours of preparation. This can unfortunately diminish the learning.

The problem is that we can spend a long time with, say, PowerPoint®, developing some really wonderful slides that may actually get in the way of the message we're trying to put across. Moreover, having invested so much time and effort in developing such slides, we're then determined to use them, not matter how inappropriate or ineffective they may be. The other problem with PowerPoint® is that many users don't realise that you can actually skip between slides – you aren't obliged to proceed from slide one to two to three to four. You can miss some out and come back to others. But if some trainers have developed 30 slides for a session, then unfortunately that's what the learners will receive!

In terms of media it's also important to consider e-learning. And while that will be dealt with later in a further chapter in this book, the increasing use of electronic media for learning has great implications for design and delivery. The biggest question here is, 'Are there resources available to develop learning in a package that will increase the employee's performance?' Many computer-based training programmes have cost thousands of pounds, and done a great disservice to the training function. It would be far better for the money to be spent in selecting an off-the-shelf programme that has already been developed and used by other customers, even if it's not wholly relevant or appropriate to the organisation. Because, if somebody else has spent a lot of time, money and effort in developing a package on, say, health and safety, teamworking, problem solving, how to use Lotus Notes®, or how set up a project management system – if that learning programme already exists, then the development costs will inevitably be dramatically reduced. Moreover, the very nature of e-learning means that it can be edited, and improved and adapted and made applicable to the organisation's needs.

And finally, while we're talking about e-learning, how will the packages be distributed? Will they be physically sent by mail, by way of CD-ROMs or DVDs, or floppy disks? Will they be available on an organisation's intranet? Or will the learners use the World Wide Web? Each of these has benefits and problems associated with it. But it's in the design stage that these factors need to be considered.

So, different learning will be accomplished by using different media and materials. Increasingly, I am tempted not to use overhead projector slides. Very rarely will I use PowerPoint®, and only occasionally will I get my learners to see the whole of a training video. DVDs offer more flexibility than linear video's. I think I prefer to use a flipchart or a whiteboard because they offer increased opportunities to be interactive and participative with the learners, rather than imposing on them my agenda, my transparencies, and my objectives.

Finally in this section, it's important to remember that certain methods and media are better for different learning outcomes. Role play or skills development is particularly good, not just for helping people to practise certain skills, but also for developing attitudes. Similarly videos, CD-ROMs and DVDs are excellent at helping learners to develop a different attitude.

Learning support processes

A learning support process involves a variety of different aspects of the training function. At one end it may include the tutor, the trainer, or the instructor, who is available or stands alongside the learner when they are being coached, or when they're developing a new skill on the job. At the other end of the spectrum it will include the whole of the training administration arena, such as the people, practices and systems that are used to facilitate the learning events. This will involve not just booking rooms and speakers, and making sure handouts and materials are available, but ensuring that the documentation is up to date with training records, and appropriate links are made to appraisals and performance management systems. In between,

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there's a whole raft of communication processes that needs to be undertaken in relation to the learner, the trainer and the line manager. Increasingly, this is done electronically by e-mail. But it's very important for effective communication to have back-up systems, team meetings, project teams, and written hard copy.

PAUSE FOR THOUGHT

Read through this case study and try the task at the end.

Focal Point Holidays is a company, which specialises in holidays for independent travellers. The company puts together holidays tailored to the individual traveller's requirements. It says no two holidays are the same!

Colin Johns and Mary Honey are the co-founders and directors of Focal Point Holidays, which they began in 1996. Initially it was just the two of them and as the business has grown, they have taken on more staff. They now have five shops in England. Each one of them has a manager and six members of staff.

You have been appointed recently as the personnel and training manager.

Colin, Mary and the shop managers form the Focal Point Holidays management team. Colin and Mary have realised that there may be some tensions in the team, as things don't seem as relaxed as they have been in the past.

Although the performance of the managers is acceptable, the directors are realising that there are areas for improvement. The level of experience and knowledge among the managers is varied. A recent incident of misconduct in one of the shops, which was not dealt with swiftly enough, has led to the directors having concerns.

Similarly, there are concerns about members of the teams working for the managers. Recently one or two of Focal Point Holiday's longest-standing customers have commented, to the directors, that service isn't what it has been in the past.

The directors, Colin and Mary, have asked you to address these issues as a matter of urgency.

You will need to look at the following areas:

- the management team – ie the managers and directors
- the branch managers
- the branch members

The directors will be looking for practical and feasible recommendations if they are to accept your proposals – and agree to fund them!

Your task

You need to make detailed design proposals, outlining your recommendations to meet the training and development areas identified. Your recommendations should include details of the proposed solutions, costs, learning outcomes, and any constraints you have considered, and outline your recommended training design including the methods you propose.

SUMMARY

We have now covered all the components of a learning plan. You now need to draw the plan together and present it to all concerned to obtain their agreement. Let's recap on what you have learned as a reminder of the various components that you may need to include. The actions and decisions that we have covered in this section are:

1. Identify the performance aims/objectives that the organisation intends to achieve as a result of the training.
2. Decide the learning objective – training and enabling objectives.
3. Establish the entry behaviour of the learners.
4. Draw up and agree a specification of learning requirements to establish a design brief.
5. Decide how learners should be prepared.
6. Select suitable training methods.
7. Select and sequence the content.
8. Decide on the media to be used.
9. Decide on a time-table.
10. Decide how to ensure that the learning is translated into performance at the workplace.
11. Review the design for any errors or omissions.
12. Specify the resources required.
13. Evaluate the costs.
14. Specify the monitoring and control systems.

Remember that many of these issues are not mutually exclusive, nor must you consider them in any particular order. You may have to modify some of your early decisions because of constraints that become known later.

QUESTIONS

1. The main board of directors of a global organisation has decided to reduce the learning and development budget for next year by 50 per cent. Assess and evaluate a range of learning strategies to address this situation.
2. Critically analyse the return on investment of two different learning options with which you are familiar.
3. The personnel manager of a large retail company has written to you as part of a benchmarking exercise, asking for advice on how to use learning and development to manage diversity in her organisation. Write her a reply.

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